Income and Assets (IAQ)

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
LFINTRO1	LFINTRO1	Now I have some questions about (PREVIOUS YEAR) income and other financial resources for [you/(SP)] [and (your/his/her) (wife/husband/partner)]. As with all information collected by the MCBS, the data are confidential and covered by the Privacy Act of 1974. Your answers will be combined with those of other respondents, and [your/his/her] Medicare benefits will not be affected in any way by your answers to these questions. GIVE BROCHURE TO RESPONDENT. ALLOW A FEW MINUTES FOR RESPONDENT TO REVIEW BROCHURE IF NECESSARY.	(01) CONTINUE (-7) Empty	[you] respondent is SP (SPPROXY=1), SP does not have a spouse who is alive and living in the household (ROSTREL^=2, or ROSTREL=2 and HHFLAG^=1) [(SP)] respondent is proxy (SPPROXY=2), SP does not have a spouse who is alive and living in the household (ROSTREL^=2, or ROSTREL=2 and HHFLAG^=1) [and your husband] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTESEX=1)) or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is male (ROSTSEX=1), proxy is SP's spouse (ROSTREL=2)) [and your wife] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTESEX=2)) or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is female (ROSTSEX=2), proxy is SP's spouse (ROSTREL=2)) [and your partner] (respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1)) or (respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is SP's partner (ROSTREL=56)) [and his husband] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2) [and his wife] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL^=2) [and his partner] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) [and her husband] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2) [and her wife] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL^=2) [and her partner] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) [your] respondent is SP (SPPROXY=1)
	BOX LFINTRO1	If SPAISTATUS = 3 (Deceased in Community) or 4 (Deceased in Instititution), go to IAQ50 - TOTAL_COMBINED1. Otherwise, go to LFINTRO2 - LFINTRO2.		
LFINTRO2	LFINTRO2	As the brochure explains, your responses to these questions can help us determine the impact of income on [your/his/her] use and access to health care. I will be asking a series of questions about [your/(SP's)/you and your (wife's/husband's/partner's)/(SP) and (his/her) (wife/husband/partner)] income and other financial resources. First, I will ask whether [you/(SP)/you and your (wife/husband/partner)/(SP) and (his/her) (wife/husband/partner)] had particular types of income or other resources. All these questions can be answered with a "yes" or a "no." Then, I will ask you to estimate [your/(SP's)/their] total income. [Please answer all questions for [you and your (wife/husband/partner)/(SP) and (his/her) (wife/husband/partner)]. Please feel free to refer to any records or other persons who may be of assistance to you.	(01) CONTINUE (-7) Empty	[your] respondent is SP (SPPROXY=1) [his] respondent is proxy (SPPROXY=2), SP male (ROSTSEX=1) [her] respondent is proxy (SPPROXY=2), SP female (ROSTSEX=2) [your] respondent is SP (SPPROXY=1), SP does not have a spouse who is alive and living in the household (ROSTREL^=2, or ROSTREL=2 and HHFLAG^=1) [(SP)'s] respondent is proxy (SPPROXY=2), SP does not have a spouse who is alive and living in the household (ROSTREL^=2, or ROSTREL=2 and HHFLAG^=1) [you and your wife's] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTESEX=2)) or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is female (ROSTSEX=2), proxy is SP's spouse (ROSTREL=2)) [you and your husband's] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTESEX=1)) or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is male (ROSTSEX=1), proxy is SP's spouse (ROSTREL=2)) [you and your partner's] (respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1)) or (respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is SP's partner (ROSTREL=56)) [(SP) and his wife's] respondent is proxy (SPPROXY=2), SP male (ROSTSEX=1), SP has spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL^=2) [(SP) and his husband's] respondent is proxy (SPPROXY=2), SP male (ROSTSEX=1), SP has spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2) [(SP) and his partner's] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) [(SP) and her wife's] respondent is proxy (SPPROXY=2), SP female (ROSTSEX=2), SP has spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL^=2) [(SP) and her husband's] respondent is proxy (SPPROXY=2), SP female (ROSTSEX=2), SP has spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2)
WORKWEEK	LF1	Did [you/(SP)] do any work for pay in the last week? By the last week, I mean the week beginning on Sunday [MONTH, DAY OF SUNDAY PRIOR TO TODAY/MONTH, DAY OF SUNDAY PRIOR TO THE SATURDAY BEFORE TODAY'S DATE] and ending [today/on Saturday (MONTH, DAY OF SATURDAY PRIOR TO TODAY'S DATE)]?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) [(SP)] respondent is proxy (SPPROXY=2) [beginning on Sunday (MONTH, DAY OF SUNDAY PRIOR TO INTERVIEW)] TODAY'S date is a Saturday [on Sunday (MONTH, DAY OF SUNDAY PRIOR TO THE SATURDAY BEFORE TODAY'S DATE)] TODAY'S date is not a Saturday [today] TODAY'S date is a Saturday [on Saturday (MONTH, DAY OF SATURDAY PRIOR TO TODAY'S DATE)] TODAY'S date is not a Saturday

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
RETNEVWK	LF1B	Is this because [you were/(SP) was] retired or [you/(SP)] never worked?	(01) RETIRED (02) NEVER WORKED (03) NO, NEITHER OF THESE IS TRUE (-8) DON'T KNOW (-8) REFUSED	[you were] respondent is SP (SPPROXY=1) [(SP) was] respondent is proxy (SPPROXY=2) [you] respondent is SP (SPPROXY=1) [(SP)] respondent is proxy (SPPROXY=2)
IAABSENT	LF2	[Do you/Does (SP)] have a job from which [you were/(he/she) was] absent last week because of illness, vacation, or some other reason?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[Do you] respondent is SP (SPPROXY=1) [Does (SP)] respondent is proxy (SPPROXY=2) [you were] respondent is SP (SPPROXY=1) [he was] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) [she was] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2)
WORKMONTH	LF3	Now think about last month, that is [MONTH BEFORE INTERVIEW MONTH]. Did [you/(SP)] do any work for pay at any time in the last month?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) [(SP)] respondent is proxy (SPPROXY=2)
MULTIJOB	LF4	Last week, did [you/(SP)] have more than one job, including part-time, evening, or weekend work?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) [(SP)] respondent is proxy (SPPROXY=2)
HOURSPERWEEK	LF5	How many hours per week [do you/does (SP)] usually work at [your/his/her] [job/main job]? [By main job, I mean the job at which (you work/{he/she} works) the most hours.] ENTER NUMBER OF HOURS USUALLY WORK IF NUMBER OF HOURS VARY EACH WEEK, ENTER 997	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[do you] respondent is SP (SPPROXY=1) [does (SP)] respondent is proxy (SPPROXY=2) [your] respondent is SP (SPPROXY=1) [his] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) [her] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2) [main job] LF4=1/YES [job] LF4^=1/YES [By main job, I mean the job at which you work the most hours.] LF4=1/YES, respondent is SP (SPPROXY=1) [By main job, I mean the job at which he works the most hours.] LF4=1/YES, respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) [By main job, I mean the job at which she works the most hours.] LF4=1/YES, respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2)
	BOX LF1	If LF2=1 (YES, ABSENT LAST WEEK), go to LF7. Otherwise, go to LF6.		
HOURSLASTWEEK1	LF6	How many hours did [you/(SP)] work last week? ENTER NUMBER OF HOURS	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) [(SP)] respondent is proxy (SPPROXY=2)
HOURSLASTWEEK2	LF7	You said [you were/(SP) was] absent from work last week. How many hours did [you/he/she] work the last week [you were/(he/she) was] at work? ENTER NUMBER OF HOURS	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you were] respondent is SP (SPPROXY=1) [(SP) was] respondent is proxy (SPPROXY=2) [you] respondent is SP (SPPROXY=1) [he] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) [she] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2) [you were] respondent is SP (SPPROXY=1) [he was] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) [she was] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2)
PAYSCHEDULE	LF8	[Are you/Is (SP)/In (your/{SP}'s) main job, [are you/is (he/she)] paid every week, every two weeks, two times a month, or on some other schedule?	(1) EVERY WEEK (2) EVERY TWO WEEKS (3) TWO TIMES A MONTH (4) ONCE A MONTH (5) DAILY (9) OTHER SCHEDULE (SPECIFY) (-8) DON'T KNOW (-9) REFUSED	[Are you] LF4^=1/YES, respondent is SP (SPPROXY=1) [Is (SP)] LF4^=1/YES, respondent is proxy (SPPROXY=2) [In your main job, are you] LF4=1/YES, respondent is SP (SPPROXY=1) [In (SP)'s main job, is he] LF4=1/YES, respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) [In (SP)'s main job, is she] LF4=1/YES, respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2)
OSPAYSCHEDULE	LF8A	SPECIFY OTHER PAYMENT SCHEDULE	(1) [continuous response]	

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LASTPAYCHECK	LF9	How much was [your/(SP)'s] last paycheck before taxes and any other deductions [for (your/his/her) main job]? IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine. IF NEEDED: If it is easier, you can just tell me how much [you earn/(SP) earns] per hour or per day. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.	(1) ENTER PAYCHECK AMOUNT (2) ENTER PAY PER HOUR (3) ENTER PAY PER DAY (-8) DON'T KNOW (-9) REFUSED	[your] respondent is SP (SPPROXY=1) [(SP)'s] respondent is proxy (SPPROXY=2) [for your main job] LF4=1/YES, respondent is SP (SPPROXY=1) [for his main job] LF4=1/YES, respondent is proxy (SPPROXY=1), SP is male (ROSTSEX=1) [for her main job] LF4=1/YES, respondent is proxy (SPPROXY=1), SP is female (ROSSEX=2)
PAYCHECKAMT	LF9A	ENTER PAYCHECK AMOUNT $	(1) [continuous response]	
PAYCHECKHOURLY	LF9B	ENTER PAY PER HOUR $	(1) [continuous response]	
PAYCHECKDAILY	LF9C	ENTER PAY PER DAY $	(1) [continuous response]	
MONTHPAY	LF10	Now thinking about the month of [CURRENT MONTH -1 MONTH], how much did [you/(SP)] earn altogether from any work [you/he/she] did in [CURRENT MONTH -1 MONTH], before taxes and before any other deductions? IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER DOLLAR AMOUNT $	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) [(SP)] respondent is proxy (SPPROXY=2) [you] respondent is SP (SPPROXY=1) [he] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) [she] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2)
	BOX LF13	~~If ENS11 JOBSTAT = 1 of [ROSTREL = 2 (SPOUSE) or ROSTREL = 51 (PARTNER) for anyone living in HH from ENS go to LF13.~~ If the SP has a spouse or partner who is living in the household (ROSTREL=2 or 56, HHFLAG=1), go to LF13. Otherwise, go to HO1.		
SPOUSEWORK	LF13	Did [you/(your/{SP}'s) (husband/wife/partner)] do any work for pay in the month of [CURRENT MONTH-1 MONTH]?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[you] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [your husband] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTSEX=1) [your wife] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTSEX=2) [your partner] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [(SP)'s husband] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)) [(SP)'s wife] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)) [(SP)'s partner] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)
SPOUSEEARN	LF14	In [CURRENT MONTH -1 MONTH], how much altogether did [you/your/(SP)'s] [husband/wife/partner] earn before taxes and before any other deductions? IF NEEDED: We don't need an exact dollar amount. An approximate amount is fine. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER DOLLAR AMOUNT $	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [your husband] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTSEX=1) [your wife] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTSEX=2) [your partner] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [(SP)'s husband] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [(SP)'s wife] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [(SP)'s partner] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
IAOWNHOME	HO1	Next, I'd like to ask you some questions about the [home/apartment or condo] [at SP's (ADDRESS 1, ADDRESS 2) from PERSON ROSTER]. [Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] own the [home/apartment or condo] at [SP's (ADDRESS 1, ADDRESS 2) from PERSON ROSTER], rent it, or is there some other arrangement?	(1) OWN (2) RENT (OR PAY MONTHLY AMOUNT) (3) SOME OTHER ARRANGEMENT (-8) DON'T KNOW (-9) REFUSED	[home] HAQ-Dwelling in(1,2,4,5,91,96,-8,-9) [apartment or condo] HAQ-Dwelling in(3,6) [Do you] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Does (SP)] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Do you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [Do you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [Do you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [Does (SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [Does (SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)
MORTGAGE	HO2	Is [your/(SP)'s] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)'s] mortgage paid off or are monthly mortgage payments still being made? IF NEEDED: Include any payments on a home equity loan or second mortgage.	(1) PAID OFF (2) STILL MAKE PAYMENTS (3) REVERSE MORTGAGE (-8) DON'T KNOW (-9) REFUSED	[your] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [(SP)'s] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [your or (SPOUSE FIRSTNAME LASTNAME)'s] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's partner (ROSTREL^=2) [your or (PARTNER FIRSTNAME LASTNAME)'s] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [your or (SP FIRSTNAME LASTNAME)'s] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP)'s or (SPOUSE FIRSTNAME LASTNAME)'s] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [(SP)'s or (PARTNER FIRSTNAME LASTNAME)'s] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)
MORTGAGE_AMT1	HO3	How much altogether is that each month? ENTER DOLLAR AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
MORTGATE_AMT2	HO3A	SHOW CARD IA1 Please look at this card and tell me which is closest. IF NEEDED: Include any payments on a home equity loan or second mortgage.	(1) LESS THAN $250 (2) $250 TO LESS THAN $500 (3) $500 TO LESS THAN $1,000 (4) $1,000 TO LESS THAN $3,000 (5) $3,000 TO LESS THAN $5,000 (6) $5,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
MORTGAGELGNTH	HO3B	[Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] expect to pay off the mortgage within 5 years, 10 years, or longer? IF NEEDED: Include any payments on a home equity loan or second mortgage.	(1) WITHIN 5 YEARS (2) WITHIN 10 YEARS (3) LONGER THAN 10 YEARS (-8) DON'T KNOW (-9) REFUSED	[Do you] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Does (SP)] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Do you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [Do you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [Do you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [Does (SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [Does (SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)

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MORTGAGEOWE1	HO3C	About how much [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] still owe on the mortgage? IF NEEDED: The nearest $10,000 is fine. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. IF NEEDED: Include any payments on a home equity loan or second mortgage. ENTER DOLLAR AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[do you] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [does (SP)] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [do you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [do you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [do you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [does (SP) or (SPOUSE FIRSTNAME LASTNAME) respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [does (SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)
MORTGAGEOWE2	HO3D	Is the amount owed…	(1) less than $50,000, (2) $50,000 to less than $100,000, or (3) $100,000 or more? (-8) DON'T KNOW (-9) REFUSED	
PRESENTVALUE1	HO4	What is the present value of this [home/apartment or condo]? I mean, about what would it bring if it was sold today, not counting any loans or outstanding mortgages? IF NEEDED: Your best guess or the nearest $10,000 is fine. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER DOLLAR AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[home] HAQ-Dwelling in(1,2,4,5,91,96,-8,-9) [apartment or condo] HAQ-Dwelling in(3,6)
PRESENTVALUE2	HO4A	SHOW CARD IA2 Please look at this card and tell me which is closest.	(1) LESS THAN $50,000 (2) $50,000 TO LESS THAN $75,000 (3) $75,000 TO LESS THAN $100,000 (4) $100,000 TO LESS THAN $200,000 (5) $200,000 TO LESS THAN $300,000 (6) $300,000 TO LESS THAN $500,000 (7) $500,000 TO LESS THAN $750,000 (8) $750,000 OF MORE (-8) DON'T KNOW (-9) REFUSED	
PAYRENT	HO5	[Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] pay rent to live here?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[Do you] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Does (SP)] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Do you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [Do you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [do you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [Does (SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [Does (SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)
RENTAMT1	HO6	How much is that each month? ENTER DOLLAR AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
RENTAMT2	HO6A	SHOW CARD IA3 Please look at this card and tell me which is closest.	(1) LESS THAN $250 (2) $250 TO LESS THAN $500 (3) $500 TO LESS THAN $1,000 (4) $1,000 TO LESS THAN $3,000 (5) $3,000 TO LESS THAN $5,000 (6) $5,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX HO1	If HO6>=$750 or HO6A=4 ($1,000 TO LESS THAN $3,000), 5 ($3,000 TO LESS THAN $5,000), OR 6 ($5,000 OR MORE) go to IAQINTRO1. Otherwise, go to HO7.		
SECTION8	HO7	Is this home in Section 8 or public housing or housing for low-income seniors?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	
IAQINTRO1	IAQINTRO1	We are interested in how people are getting along financially these days. The next few questions are about income and other resources. Your responses can help us understand how people manage financially as they age. Please feel free to refer to any records or other persons that may be of assistance in answering these questions. Many of these questions ask about "last month." By last month, I mean in [CURRENT MONTH – 1].		
SSRR_LASTMONTH	IAQ1	Did [you/(SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive Social Security retirement and/or Railroad Retirement payments in the last month, that is in [CURRENT MONTH –1]? IF NEEDED: These checks are either automatically deposited in the bank or mailed to arrive on the 3rd of every month. If mailed, they are often sent in gold or manila-colored envelopes. [SELECT ALL THAT APPLY]	(1) YES, SP RECEIVED PAYMENT FROM SOURCE (2) YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE (3) NO PAYMENT RECEIVED FROM THIS SOURCE (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [(SP)] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [(SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) Display "SELECT ALL THAT APPLY" and response option 2 ("YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE") if SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display. Display "in the last month" in underlined text.
	BOX IAQ1	IF IAQ1 NE (1) SP PAYMENT THEN GO TO IAQ4, ELSE GO TO IAQ2		
SSDEPOSIT	IAQ2	[Do you/Does (SP)] get payments by direct deposit, on a prepaid card, or by mail?	(1) MAIL (2) DIRECT DEPOSIT (3) PREPAID CARD (-8) DON'T KNOW (-9) REFUSED	[Do you] respondent is SP (SPPROXY=1) [Does (SP)] respondent is proxy (SPPROXY=2)
MMSTARTSS	IAQ3	What month and year did [you/(SP)] start receiving Social Security? ENTER MONTH	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) [(SP)] respondent is proxy (SPPROXY=2)
YYSTARTSS	IAQ3	What month and year did [you/(SP)] start receiving Social Security? ENTER YEAR	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) [(SP)] respondent is proxy (SPPROXY=2)

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
SSI_LASTMONTH	IAQ4	Did [you/(SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive Supplemental Security Income, which is also called SSI, last month? IF NEEDED: These are monthly government payments to lower-income people in need. [SELECT ALL THAT APPLY]	(1) YES, SP RECEIVED PAYMENT FROM SOURCE (2) YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE (3) NO PAYMENT RECEIVED FROM THIS SOURCE (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [(SP)] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [(SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) Display "SELECT ALL THAT APPLY" and response option 2 ("YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE") if SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display. Display "in the last month" in underlined text.
VA_LASTMONTH	IAQ5	Did [you/(SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive any payments from the Veteran's Administration, last month related to military service or veteran survivor's benefits? [IF NEEDED: The Veteran's Administration is also known as the U.S. Department of Veterans Affairs.] [SELECT ALL THAT APPLY]	(1) YES, SP RECEIVED PAYMENT FROM SOURCE (2) YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE (3) NO PAYMENT RECEIVED FROM THIS SOURCE (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [(SP)] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [(SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) Display "SELECT ALL THAT APPLY" and response option 2 ("YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE") if SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display. Display "last month" in underlined text.
PENSION_LASTMONTH	IAQ6	People sometimes have other retirement income. This may be from pensions or retirement plans related to their jobs. [Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME/SPOUSE FIRSTNAME LASTNAME/PARTNER FIRSTNAME LASTNAME)] have any pension plans that were a job-related or union benefit? IF NEEDED: These plans often require that a person work for a certain number of years before they qualify or "are vested" in the pension plan. [SELECT ALL THAT APPLY]	(1) YES, SP HAS PENTION (2) YES, SPOUSE/PARTNER HAS PENSION (3) NO PENSIONS (-8) DON'T KNOW (-9) REFUSED	[Do you] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Does (SP)] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Do you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [Do you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [do you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [Does (SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [Does (SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) Display "SELECT ALL THAT APPLY" and response option 2 ("YES, SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE") if SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
401K_LASTMONTH	IAQ7	SHOW CARD IA4 Please look at the types of retirement plans on this card. [Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME/SPOUSE FIRSTNAME LASTNAME/PARTNER FIRSTNAME LASTNAME)] have any of these? IF NEEDED: 401Ks and 403Bs are plans where you contribute an amount each month from your paycheck, and your employer may match some of your contribution. IF NEEDED: IRAs, also known as Individual Retirement Accounts, are a type of plan you set up on your own. [SELECT ALL THAT APPLY]	(1) YYES, SP HAS 401K, 403B, IRA, OR OTHER RETIREMENT PLANS (2) YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, OR OTHER RETIREMENT PLANS (3) NO PLANS (-8) DON'T KNOW (-9) REFUSED	[Do you] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Does (SP)] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Do you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [Do you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [do you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [Does (SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [Does (SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) Display "SELECT ALL THAT APPLY" and response option 2 ("YES, SPOUSE/PARTNER HAS 401K, 403B, IRA, or KEOGH") if SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.
MUTUALFUNDS	IAQ8	[(Not including the retirement accounts we have already talked about, {do you/does [SP]})/(Do you/Does {SP})] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] own any mutual funds or stocks? [SELECT ALL THAT APPLY]	(1) YES, SP HAS ASSET (2) YES, SPOUSE/PARTNER HAS ASSET (3) YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY (4) NO ASSET OF THIS TYPE (-8) DON'T KNOW (-9) REFUSED	Not including the retirement accounts we have already talked about, do you] IA7=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Not including the retirement accounts we have already talked about, does (SP)] IA7=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Not including the retirement accounts we have already talked about, do you or (SPOUSE FIRSTNAME LASTNAME)] IA7=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [Not including the retirement accounts we have already talked about, do you or (PARTNER FIRSTNAME LASTNAME)] IA7=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [Not including the retirement accounts we have already talked about, do you or (SP FIRSTNAME LASTNAME)] IA7=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1), proxy is SP's spouse or partner (ROSTREL=2 or 56) [Not including the retirement accounts we have already talked about, does (SP) or (SPOUSE FIRSTNAME LASTNAME)] IA7=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [Not including the retirement accounts we have already talked about, does (SP) or (PARTNER FIRSTNAME LASTNAME)] IA7=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) [Do you] IA7^=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Does (SP)] IA7^=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Do you or (SPOUSE FIRSTNAME LASTNAME)] IA7^=1/SP RETIREMENT ACCT or 2/SPOUSE RETIREMENT ACCT, respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1)
BONDS	IAQ9	Not including what we've already talked about, [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] own any bonds, such as Government Savings Bonds, corporate, municipal, or other types of bonds? [SELECT ALL THAT APPLY]	(1) YES, SP HAS ASSET (2) YES, SPOUSE/PARTNER HAS ASSET (3) YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY (4) NO ASSET OF THIS TYPE (-8) DON'T KNOW (-9) REFUSED	[do you] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [does (SP)] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [do you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [do you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [do you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [does (SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [does (SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) Display "SELECT ALL THAT APPLY" and response option 2 ("YES, SPOUSE/PARTNER HAS ASSET") and response option 3 ("YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY") if SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
CHECKING	IAQ10	The next questions ask about different kinds of bank or savings accounts people sometimes have or property they own. Not counting what we've already talked about, [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have… A checking account?	(1) YES, SP HAS ASSET (2) YES, SPOUSE/PARTNER HAS ASSET (3) YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY (4) NO ASSET OF THIS TYPE (-8) DON'T KNOW (-9) REFUSED	[do you] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [does (SP)] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [do you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [do you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [do you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [does (SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [does (SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) Display response option 2 ("YES, SPOUSE/PARTNER HAS ASSET") and 3 ("YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY") if SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.
SAVINGS	IAQ11	[IF NEEDED: Not counting what we've already talked about, [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have…] A savings account or money market account?	(1) YES, SP HAS ASSET (2) YES, SPOUSE/PARTNER HAS ASSET (3) YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY (4) NO ASSET OF THIS TYPE (-8) DON'T KNOW (-9) REFUSED	[do you] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [does (SP)] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [do you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [do you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [do you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [does (SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [does (SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) Display response option 2 ("YES, SPOUSE/PARTNER HAS ASSET") and 3 ("YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY") if SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.
CERTDEPOSIT	IAQ12	[IF NEEDED: Not counting what we've already talked about, [do you/does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have…] Certificates of deposit?	(1) YES, SP HAS ASSET (2) YES, SPOUSE/PARTNER HAS ASSET (3) YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY (4) NO ASSET OF THIS TYPE (-8) DON'T KNOW (-9) REFUSED	[Do you] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Does (SP)] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Do you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [Do you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [do you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [Does (SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [Does (SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) Display response option 2 ("YES, SPOUSE/PARTNER HAS ASSET") and 3 ("YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY") if SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display.

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
OTHER_LAND	IAQ13	[Do you/Does (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] own a business, a farm, or any other real estate [besides (your/{SP}'s) home], including land or rental properties? [SELECT ALL THAT APPLY]	(1) YES, SP HAS ASSET (2) YES, SPOUSE/PARTNER HAS ASSET (3) YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY (4) NO ASSET OF THIS TYPE (-8) DON'T KNOW (-9) REFUSED	[Do you] respondent is SP (SPPROXY=1), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Does (SP)] respondent is proxy (SPPROXY=2), SP does not have spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [Do you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [Do you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [do you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [Does (SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [Does (SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) Display "SELECT ALL THAT APPLY" and response option 2 ("YES, SPOUSE/PARTNER HAS ASSET") and response option 3 ("YES, SP AND SPOUSE/PARTNER HAVE ASSET JOINTLY") if SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1). Else do not display. [besides your home] respondent is SP (SPPROXY=1), SP owns home (HP1=1) [besides (SP)'s home] respondent is proxy (SPPROXY=2), SP owns home (HP1=1)
IAQINTRO2	IAQINTRO2	We now have a few questions about income which are important for understanding how people manage financially as they age.		
	BOX IAQ2	If IAQ1 = 1 (SP RECEIVED SS/RR) and 2 (SPOUSE RECEIVED SS/RR), go to IAQ14. Else if IA1 = 1 (SP RECEIVED SS/RR), go to IAQ15A. Else if IA1 = 2 (SPOUSE RECEIVED SS/RR), go to IAQ16A. Otherwise, go to BOX IAQ3.		
SSRR_COMBINED1	IAQ14	First, what was the amount of [your/(SP)'s] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)]'s most recent monthly Social Security or Railroad Retirement payment (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[your] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP)'s] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1) or respondent is proxy and proxy is not SP's spouse (ROSTREL^=56), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [(PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1) or or respondent is proxy and proxy is not SP's spouse or partner (ROSTREL^=2 or 56), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [(SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)
SSRR_COMBINED2	IAQ14A	ENTER COMBINED SP AND SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
SSRR_COMBINED3	IAQ14B	SHOW CARD IA5 Please look at this card and tell me which is closest.	(1) LESS THAN $1,300 (2) $1,300 TO LESS THAN $1,700 (3) $1,700 TO LESS THAN $2,200 (3) $2,200 TO LESS THAN $2,600 (5) $2,600 OR MORE (-8) DON'T KNOW (-9) REFUSED	
SSRR_SP_AMT1	IAQ15A	What was the amount of [your/(SP)'s] most recent monthly Social Security or Railroad Retirement payment (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SP SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[your] respondent is SP (SPPROXY=1) [(SP)'s] respondent is proxy (SPPROXY=2)

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
SSRR_SP_AMT2	IAQ15B	SHOW CARD IA6 Please look at this card and tell me which is closest.	(1) LESS THAN $700 (2) $700 TO LESS THAN $1,000 (3) $1,000 TO LESS THAN $1,300 (4) $1,300 TO LESS THAN $1,600 (5) $1,600 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ2A	If IAQ14 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ16A. Otherwise, go to BOX IAQ3.		
SSRR_SPOUSE_AMT1	IAQ16A	What was the amount of [your/(SPOUSE FIRSTNAME LASTNAME)'s/(PARTNER FIRSTNAME LASTNAME)'s] most recent monthly Social Security or Railroad Retirement payment (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SPOUSE/PARTNER SOCIAL SECURITY/RAILROAD RETIREMENT AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[your] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)'s] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)'s] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56)
SSRR_SPOUSE_AMT2	IAQ16B	SHOW CARD IA6 Please look at this card and tell me which is closest.	(1) LESS THAN $700 (2) $700 TO LESS THAN $1,000 (3) $1,000 TO LESS THAN $1,300 (4) $1,300 TO LESS THAN $1,600 (5) $1,600 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ3	If IAQ4 = 1 (SP RECEIVED SSI) and 2 (SPOUSE RECEIVED SSI), go to IAQ17. Else if IAQ4 = 1 (SP RECEIVED SSI), go to IAQ18A. Else if IAQ4 = 2 (SPOUSE RECEIVED SSI), go to IAQ19A. Otherwise, go to BOX IAQ4.		
SSRR_COMBINED1	IAQ17	What was the amount of [your/(SP)'s] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)]'s most recent monthly SSI payment (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[your] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP)'s] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [(SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56)
SSRR_COMBINED2	IAQ17A	ENTER COMBINED SP AND SPOUSE/PARTNER SSI AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
SSRR_COMBINED3	IAQ17B	SHOW CARD IA7 Please look at this card and tell me which is closest.	(1) LESS THAN $300 (2) $300 TO LESS THAN $700 (3) $700 TO LESS THAN $1,000 (4) $1,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
SSI_SP_AMT1	IAQ18A	What was the amount of [your/(SP)'s] most recent monthly SSI payment (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SP SSI AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[your] respondent is SP (SPPROXY=1) [(SP)'s] respondent is proxy (SPPROXY=2)
SSI_SP_AMT2	IAQ18B	SHOW CARD IA8 Please look at this card and tell me which is closest.	(1) LESS THAN $100 (2) $100 TO LESS THAN $200 (3) $200 TO LESS THAN $400 (4) $400 TO LESS THAN $700 (5) $700 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ3A	If IAQ17 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ19A. Otherwise, go to BOX IAQ4.		
SSI_SPOUSE_AMT3	IAQ19A	What was the amount of [your/(SPOUSE FIRSTNAME LASTNAME)'s/(PARTNER FIRSTNAME LASTNAME)'s] most recent monthly SSI payment (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SPOUSE/PARTNER SSI AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[your] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56)
SSI_SPOUSE_AMT4	IAQ19B	SHOW CARD IA8 Please look at this card and tell me which is closest.	(1) LESS THAN $100 (2) $100 TO LESS THAN $200 (3) $200 TO LESS THAN $400 (4) $400 TO LESS THAN $700 (5) $700 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ4	If IAQ5 = 1 (SP RECEIVED VA) and 2 (SPOUSE RECEIVED VA), go to IAQ20. Else if IAQ5 = 1 (SP RECEIVED VA), go to IA21A. Else if IAQ5 = 2 (SPOUSE RECEIVED VA), go to IAQ22A. Otherwise, go to BOX IAQ5.		
VA_AMT_COMBINED1	IAQ20	What was the amount of [your/(SP)'s] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)]'s most recent monthly Veteran's Administration payment (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[your] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP)'s] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [(SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56)
VA_AMT_COMBINED2	IAQ20A	ENTER COMBINED SP AND SPOUSE/PARTNER VA AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
VA_AMT_COMBINED3	IAQ20B	SHOW CARD IA9 Please look at this card and tell me which is closest.	(1) LESS THAN $1,000 (2) $1,000 TO LESS THAN $1,400 (3) $1,400 TO LESS THAN $1,800 (4) $1,800 TO LESS THAN $2,200 (5) $2,200 OR MORE (-8) DON'T KNOW (-9) REFUSED	
VA_SP_AMT1	IAQ21A	What was the amount of [your/(SP)'s] most recent monthly Veteran's Administration payment (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SP VA AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[your] respondent is SP (SPPROXY=1) [(SP)'s] respondent is proxy (SPPROXY=2)
VA_SP_AMT2	IAQ21B	SHOW CARD IA10 Please look at this card and tell me which is closest.	(1) LESS THAN $500 (2) $500 TO LESS THAN $700 (3) $700 TO LESS THAN $900 (4) $900 TO LESS THAN $1,100 (5) $1,100 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ4A	If IAQ20 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ22A. Otherwise, go to BOX IAQ5.		
VA_SPOUSE_AMT1	IAQ22A	What was the amount of [your/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)'s] most recent monthly Veteran's Administration payment (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SPOUSE/PARTNER VA AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[your] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56)
VA_SPOUSE_AMT2	IAQ22B	SHOW CARD IA10 Please look at this card and tell me which is closest.	(1) LESS THAN $500 (2) $500 TO LESS THAN $700 (3) $700 TO LESS THAN $900 (4) $900 TO LESS THAN $1,100 (5) $1,100 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ5	If IAQ6 = 1 (SP RECEIVED PENSION PLAN) and 2 (SPOUSE RECEIVED PENSION PLAN), go to IAQ23. Else if IAQ6 = 1 (SP RECEIVED PENSION PLAN), go to IAQ24A. Else if IAQ6 = 2 (SPOUSE RECEIVED PENSION PLAN), go to IAQ25A. Otherwise, go to BOX IAQ6.		

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
PENSION_COMBINED1	IAQ23	You told me earlier that [you/(SP)] and [({SP FIRSTNAME LASTNAME}/{SPOUSE FIRSTNAME LASTNAME}/{PARTNER FIRSTNAME LASTNAME}] have job-related pension plans. In all, how much was received from these pension plans in the last month, before any federal or state taxes were taken out (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP)] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [(SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56)
PENSION_COMBINED2	IAQ23A	ENTER COMBINED SP AND SPOUSE/PARTNER PENSION PLAN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
PENSION_COMBINED3	IAQ23B	SHOW CARD IA11 Please look at this card and tell me which is closest.	(1) LESS THAN $600 (2) $600 TO LESS THAN $1,300 (3) $1,300 TO LESS THAN $2,100 (4) $2,100 TO LESS THAN $5,900 (5) $5,900 OR MORE (-8) DON'T KNOW (-9) REFUSED	
PENSION_SP_AMT1	IAQ24A	[You told me earlier that (you have/{SP} has) a job-related pension plan.] In all, how much was received from [(your/{SP}'s) job-related/this] pension plan in the last month, before any federal or state taxes were taken out (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SP PENSION PLAN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[You told me earlier that you have a job-related pension plan.] IA23^=2, respondent is SP (SPPROXY=1) [You told me earlier that (SP) has a job-related pension plan.] IA23^=2, respondent is proxy (SPPROXY=2) [your job-related] IA23=2, respondent is SP (SPPROXY=1) [(SP)'s job-related] IA23=2, respondent is proxy (SPPROXY=2) [this] IA23^=2
PENSION_SP_AMT2	IAQ24B	SHOW CARD IA12 Please look at this card and tell me which is closest.	(1) LESS THAN $400 (2) $400 TO LESS THAN $900 (3) $900 TO LESS THAN $1,600 (4) $1,600 TO LESS THAN $3,800 (5) $3,800 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ5A	If IAQ23 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ25A. Otherwise, go to BOX IAQ6.		
PENSION_SPOUSE_AMT1	IAQ25A	[You told me earlier that (you have/{(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)} has}) a job-related pension plan.] In all, how much was received from [(your/{SPOUSE FIRSTNAME LASTNAME}'s/{PARTNER FIRSTNAME LASTNAME}'s job-related)/this] pension plan in the last month, before any federal or state taxes were taken out (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SPOUSE/PARTNER PENSION PLAN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[You told me earlier that you have a job-related pension plan.] IA23^=2, respondent is proxy (SPPROXY=2), proxy is SP's partner or spouse (ROSTREL=2 or 56) [You told me earlier that (SPOUSE FIRSTNAME LASTNAME) has a job-related pension plan.] IA23^=2, SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [You told me earlier that (PARTNER FIRSTNAME LASTNAME) has a job-related pension plan.] IA23^=2, SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) [your job-related] IA23=2, respondent is proxy (SPPROXY=2), proxy is SP's partner or spouse (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)'s job-related] IA23=2, SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)'s job-related] IA23=2, SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) [this] IA23^=2

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
PENSION_SPOUSE_AMT2	IAQ25B	SHOW CARD IA12 Please look at this card and tell me which is closest.	(1) LESS THAN $400 (2) $400 TO LESS THAN $900 (3) $900 TO LESS THAN $1,600 (4) $1,600 TO LESS THAN $3,800 (5) $3,800 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ6	If IAQ7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ26. Else if IAQ7 = 1 (SP HAS RETIREMENT ACCT), go to IAQ27A. Else if IAQ7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ28A. Otherwise, go to BOX IAQ9.		
401K_COMBINED1	IAQ26	This next question is a bit different. You mentioned that [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have retirement accounts. In total, about how much is currently in all of these retirement accounts? IF NEEDED: Retirement accounts include 401K, 403B, IRA, and other retirement accounts. IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP)] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [(SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) Display "currently" in underlined text.
401K_COMBINED2	IAQ26A	ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
401K_COMBINED3	IAQ26B	SHOW CARD IA13 Please look at this card and tell me which is closest.	(1) LESS THAN $34,000 (2) $34,000 TO LESS THAN $82,000 (3) $82,000 TO LESS THAN $175,000 (4) $175,000 TO LESS THAN $413,000 (5) $413,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
401K_SP_AMT1	IAQ27A	This next question is a bit different. You mentioned that [you have/(SP) has] retirement accounts. In total, about how much is currently in all of these retirement accounts? IF NEEDED: Retirement accounts include 401K, 403B, IRA and other retirement accounts. IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SP RETIREMENT ACCOUNT AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you have] respondent is SP (SPPROXY=1) [(SP) has] respondent is proxy (SPPROXY=2) Display "currently" in underlined text.

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
401K_SP_AMT2	IAQ27B	SHOW CARD IA14 Please look at this card and tell me which is closest.	(1) LESS THAN $20,000 (2) $20,000 TO LESS THAN $47,000 (3) $47,000 TO LESS THAN $92,000 (4) $92,000 TO LESS THAN $218,000 (5) $218,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ6A	If IAQ26 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ28A. Otherwise, go to BOX IAQ7.		
401K_SPOUSE_AMT1	IAQ28A	This next question is a bit different. You mentioned that [you have/({SPOUSE FIRSTNAME LASTNAME}/{PARTNER FIRSTNAME LASTNAME} has]] retirement accounts. In total, about how much is <u>currently</u> in all of these retirement accounts? IF NEEDED: Retirement accounts include 401K, 403B, IRA and other retirement accounts. IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you have] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME) has] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME) has] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) Display "currently" in underlined text.
401K_SPOUSE_AMT2	IAQ28B	SHOW CARD IA14 Please look at this card and tell me which is closest.	(1) LESS THAN $20,000 (2) $20,000 TO LESS THAN $47,000 (3) $47,000 TO LESS THAN $92,000 (4) $92,000 TO LESS THAN $218,000 (5) $218,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ7	If IAQ7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ29. Else if IAQ7 = 1 (SP HAS RETIREMENT ACCT), go to IAQ30A. Else if IAQ7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ31A. Otherwise, go to BOX IAQ8.		
RECIEVE_COMBINED1	IAQ29	<u>Last month</u>, how much altogether did [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive or withdraw from all of these retirement accounts (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP)] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [(SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) Display "Last month" in bold, underlined text.
RECIEVE_COMBINED2	IAQ29A	ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
RECIEVE_COMBINED3	IAQ29B	SHOW CARD IA15 Please look at this card and tell me which is closest.	(1) LESS THAN $200 (2) $200 TO LESS THAN $500 (3) $500 TO LESS THAN $1,000 (4) $1,000 TO LESS THAN $2,500 (5) $2,500 OR MORE (-8) DON'T KNOW (-9) REFUSED	
RECEIVE_SP1	IAQ30A	<u>Last month</u>, how much altogether did [you/(SP)] receive or withdraw from [your/his/her] retirement accounts (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SP RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) [(SP)] respondent is proxy (SPPROXY=2) [your] respondent is SP (SPPROXY=1) [his] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) [her] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2) Display "Last month" in underlined text.
RECEIVE_SP2	IAQ30B	SHOW CARD IA16 Please look at this card and tell me which is closest.	(1) LESS THAN $100 (2) $100 TO LESS THAN $300 (3) $300 TO LESS THAN $700 (4) $700 TO LESS THAN $1,700 (5) $1,700 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ7A	If IAQ29 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ31A. Otherwise, go to BOX IAQ8.		
RECEIVE_SPOUSE1	IAQ31A	<u>Last month</u>, how much altogether did [you/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive or withdraw from [your/his/her] retirement accounts (for the month of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME) has] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME) has] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) [your] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [his] SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1), SP's spouse or partner is male (ROSTSEX=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [her] SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1), SP's spouse or partner is female (ROSTSEX=2), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) Display "Last month" in underlined text.
RECEIVE_SPOUSE2	IAQ31B	SHOW CARD IA16 Please look at this card and tell me which is closest.	(1) LESS THAN $100 (2) $100 TO LESS THAN $300 (3) $300 TO LESS THAN $700 (4) $700 TO LESS THAN $1,700 (5) $1,700 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ8	If IAQ7 = 1 (SP HAS RETIREMENT ACCT) and 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ32. Else if IAQ7 = 1 (SP HAS RETIREMENT ACCT), go to IAQ33A. Else if IAQ7 = 2 (SPOUSE HAS RETIREMENT ACCT), go to IAQ34A. Otherwise, go to BOX IAQ9.		

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
YRRECIEVE_COMBINED1	IAQ32	Now thinking about all of <u>last year</u>, that is calendar year [CURRENT YEAR − 1], how much altogether did [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive or withdraw from all of these retirement accounts? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP)] respondent is proxy (SPPROXY=2), SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [(SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) Display "Last year" in bold, underlined text.
YRRECIEVE_COMBINED2	IAQ32A	ENTER COMBINED SP AND SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
YRRECIEVE_COMBINED3	IAQ32B	SHOW CARD IA17 Please look at this card and tell me which is closest.	(1) LESS THAN $2,400 (2) $2,400 TO LESS THAN $6,000 (3) $6,000 TO LESS THAN $12,000 (4) $12,000 TO LESS THAN $30,000 (5) $30,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
YRRECEIVE_SP1	IAQ33A	Now thinking about all of <u>last year</u>, that is calendar year [CURRENT YEAR − 1], how much altogether did [you/(SP)] receive or withdraw from all of [your/his/her] retirement plans? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SP RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) [(SP)] respondent is proxy (SPPROXY=2) [your] respondent is SP (SPPROXY=1) [his] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) [her] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2) Display "last year" in underlined text.
YRRECEIVE_SP2	IAQ33B	SHOW CARD IA18 Please look at this card and tell me which is closest.	(1) LESS THAN $1,200 (2) $1,200 TO LESS THAN $3,600 (3) $3,600 TO LESS THAN $8,400 (4) $8,400 TO LESS THAN $20,400 (5) $20,400 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ8A	If IAQ32 = 2 (ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY), go to IAQ34A. Otherwise, go to BOX IAQ9.		
YRRECEIVE_SPOUSE1	IAQ34A	Now thinking about all of <u>last year</u>, that is calendar year [CURRENT YEAR − 1], how much altogether did [you/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive or withdraw from all of [your/his/her] retirement plans? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SPOUSE/PARTNER RETIREMENT ACCOUNT RECEIVED/WITHDRAWN AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) [your] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [his] SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1), SP's spouse or partner is male (ROSTSEX=1), if respondent is proxy then proxy is not SP's spouse or proxy (ROSTREL^=2 or 56) [her] SP has a spouse or partner who is alive and living in the household (ROSTREL=2 or 56, HHFLAG=1), SP's spouse or partner is female (ROSTSEX=2), if respondent is proxy then proxy is not SP's spouse or proxy (ROSTREL^=2 or 56) Display "last year" in underlined text.

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
YRRECEIVE_SPOUSE2	IAQ34B	SHOW CARD IA18 Please look at this card and tell me which is closest.	(1) LESS THAN $1,200 (2) $1,200 TO LESS THAN $3,600 (3) $3,600 TO LESS THAN $8,400 (4) $8,400 TO LESS THAN $20,400 (5) $20,400 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ9	If [IAQ8 = 1 (SP MUTUAL FUNDS) and IAQ8 = 2 (SPOUSE MUTUAL FUNDS)] or IAQ8 = 3 (JOINT MUTUAL FUNDS) or [IAQ9 = 1 (SP BONDS) and IAQ9 = 2 (SPOUSE BONDS)] or IAQ9 = 3 (JOINT BONDS), go to IAQ35. Else if IAQ8 = 1 (SP MUTUAL FUNDS) or IAQ9 = 1 (SP BONDS), go to IAQ36A. Else if IAQ8 = 2 (SPOUSE MUTUAL FUNDS) or IAQ9 = 2 (SPOUSE BONDS), go to IAQ37A. Otherwise, go to BOX IAQ10.		
OTHER_COMBINED1	IAQ35	You told me earlier that [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE/PARTNER FIRSTNAME LASTNAME]] own [mutual funds or stocks] [government, corporate, or other bonds] that are not part of retirement accounts. About how much are these worth? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP)] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [(SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) [mutual funds or stocks] IA8 =1/SP MUTUAL FUNDS or 2/SPOUSE MUTUAL FUNDS or 3/JOINT MUTUAL FUNDS [government, corporate, or other bonds] IA9=1/SP BONDS or 2/SPOUSE BONDS or 3/JOINT BONDS If more than one type of asset displayed, display "and" between them.
OTHER_COMBINED2	IAQ35A	ENTER COMBINED SP AND SPOUSE'S/PARTNER'S MUTUAL FUNDS/STOCKS/BONDS AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
OTHER_COMBINED3	IAQ35B	SHOW CARD IA19 Please look at this card and tell me which is closest.	(1) LESS THAN $9,000 (2) $9,000 TO LESS THAN $18,000 (3) $18,000 TO LESS THAN $93,000 (4) $93,000 TO LESS THAN $350,000 (5) $350,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ9A	If [IAQ8 = 1 (SP MUTUAL FUNDS) and IAQ8 = 2 (SPOUSE MUTUAL FUNDS)] or IAQ8= 3 (JOINT MUTUAL FUNDS), go to IAQ35B. Otherwise, go to IAQ35C.		
OTHER_COMBINED4	IAQ35C	SHOW CARD IA20 Please look at this card and tell me which is closest.	(1) LESS THAN $600 (2) $600 TO LESS THAN $5,000 (3) $5,000 TO LESS THAN $16,000 (4) $16,000 TO LESS THAN $62,000 (5) $62,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
OTHER_SP1	IAQ36A	You told me earlier that [you own/(SP) owns] [mutual funds or stocks] [government, corporate, or other bonds] that are not part of retirement accounts. About how much are these worth? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SP MUTUAL FUNDS/STOCKS/BONDS AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you own] respondent is SP (SPPROXY=1) [(SP) owns] respondent is proxy (SPPROXY=2) [mutual funds or stocks] IA8=1/SP MUTUAL FUNDS [government, corporate, or other bonds] IA9=1/SP BONDS If more than one type of asset displayed, display "and" between them.
	BOX IAQ9B	If IAQ8 = 1 (SP MUTUAL FUNDS), go to IAQ36B. Otherwise, go to IAQ36C.		
OTHER_SP2	IAQ36B	SHOW CARD IA21 Please look at this card and tell me which is closest.	(1) LESS THAN $8,000 (2) $8,000 TO LESS THAN $62,000 (3) $62,000 TO LESS THAN $192,000 (4) $192,000 TO LESS THAN $213,000 (5) $213,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
OTHER_SP3	IAQ36C	SHOW CARD IA22 Please look at this card and tell me which is closest.	(1) LESS THAN $300 (2) $300 TO LESS THAN $2,500 (3) $2,500 TO LESS THAN $8,000 (4) $8,000 TO LESS THAN $37,000 (5) $37,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ9C	If IAQ8 = 2 (SPOUSE MUTUAL FUNDS) or IAQ9 = 2 (SPOUSE BONDS), go to IAQ37A. Otherwise, go to BOX IAQ10.		
OTHER_SPOUSE1	IAQ37A	You told me earlier that [you own/(SPOUSE FIRSTNAME LASTNAME) owns/(PARTNER FIRSTNAME LASTNAME) owns] [mutual funds or stocks] [government, corporate, or other bonds] that are not part of retirement accounts. About how much are these worth? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SPOUSE'S/PARTNER'S MUTUAL FUNDS/STOCKS/BONDS AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you own] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME) owns] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME) owns] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) [mutual funds or stocks] IA8=2/SPOUSE MUTUAL FUNDS [government, corporate, or other bonds] IA9=2/SPOUSE BONDS If more than one type of asset displayed, display "and" between each one.
	BOX IAQ9D	If IAQ8 = 2 (SPOUSE MUTUAL FUNDS), go to IAQ37B. Otherwise, go to IA37B.		
OTHER_SPOUSE2	IAQ37B	SHOW CARD IA21 Please look at this card and tell me which is closest.	(1) LESS THAN $8,000 (2) $8,000 TO LESS THAN $62,000 (3) $62,000 TO LESS THAN $192,000 (4) $192,000 TO LESS THAN $213,000 (5) $213,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
OTHER_SPOUSE3	IAQ37C	SHOW CARD IA22

Please look at this card and tell me which is closest. | (1) LESS THAN $300
(2) $300 TO LESS THAN $2,500
(3) $2,500 TO LESS THAN $8,000
(4) $8,000 TO LESS THAN $37,000
(5) $37,000 OR MORE
(-8) DON'T KNOW
(-9) REFUSED | |
| | BOX IAQ10 | If [IAQ10 = 1 (SP CHECKING) and IAQ10 = 2 (SPOUSE CHECKING)] or [IAQ10 = 3 (JOINT CHECKING) or [IAQ11 = 1 (SP SAVINGS) and IAQ11 = 2 (SPOUSE SAVINGS)] or IAQ11 = 3 (JOINT SAVINGS), or [IAQ12 = 1 (SP CDS) and IAQ12= 2 (SPOUSE CDS) or IAQ12 = 3 (JOINT CDS), go to IAQ38.
Else if IAQ10 = 1 (SP CHECKING) or IAQ11 = 1 (SP SAVINGS) or IAQ13 = 1 (SP CDS), go to IAQ39A.
Else if IAQ10 = 2 (SPOUSE CHECKING) or IAQ11 = 2 (SPOUSE SAVINGS) or IAQ13 = 2 (SPOUSE CDS), go to IAQ40A.
Otherwise, go to BOX IAQ11. | | |
| ACCTS_COMBINED1 | IAQ38 | You told me earlier that [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have [checking accounts] [savings or money market accounts] [certificates of deposit or CDs].

If you added up all of these accounts, about how much were they worth early last month (meaning in the beginning of [CURRENT MONTH – 1])?

IF NEEDED: We don't need an exact dollar amount.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. | (1) ENTER COMBINED AMOUNT
(2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY
(-8) DON'T KNOW
(-9) REFUSED | [you] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56)
[(SP)] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

[(SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56)
[(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2)
[(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56)

[checking accounts] IA10a=1/SP CHECKING or IA10a=2/SPOUSE CHECKING or IA10a=3/JOINT CHECKING
[savings or money market accounts] IA10b=1/SP SAVINGS or IA10b=2/SPOUSE SAVINGS or IA10b=3/JOINT SAVINGS
[certificates of deposit or CDs] IA10c=1/SP CDS or IA10c=2/SPOUSE CDS or IA10c=3/JOINT CDS

If more than one type of account displayed, display "and" between each one.

Display "last month" in underlined text. |
| ACCTS_COMBINED2 | IAQ38A | ENTER COMBINED SP AND SPOUSE'S/PARTNER'S ACCOUNTS TOTAL AMOUNT | (1) [continuous response]
(-8) DON'T KNOW
(-9) REFUSED | |
| | BOX IAQ10A | If IAQ12 = [1 (SP CDs) and 2 (SPOUSE CDs)] or 3 (JOINT CDs), go to IAQ38B.
Otherwise, go to IAQ38C. | | |
| ACCTS_SEPARATE1 | IAQ38B | SHOW CARD IA23

Please look at this card and tell me which is closest. | (1) LESS THAN $11,000
(2) $11,000 TO LESS THAN $25,000
(3) $25,000 TO LESS THAN $50,000
(4) $50,000 TO LESS THAN $108,000
(5) $108,000 OR MORE
(-8) DON'T KNOW
(-9) REFUSED | |
| ACCTS_SEPARATE2 | IAQ38C | SHOW CARD IA24

Please look at this card and tell me which is closest. | (1) LESS THAN $2,000
(2) $2,000 TO LESS THAN $7,000
(3) $7,000 TO LESS THAN $17,000
(4) $17,000 TO LESS THAN $57,000
(5) $57,000 OR MORE
(-8) DON'T KNOW
(-9) REFUSED | |

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
ACCTS_SP1	IAQ39A	You told me earlier that [you have/(SP) has] [a checking account] [a savings or money market account] [certificates of deposit or CDs]. If you added up all of these accounts, about how much were they worth early <u>last month</u> (meaning in the beginning of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SP ACCOUNTS TOTAL AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you have] respondent is SP (SPPROXY=1) [(SP) has] respondent is proxy (SPPROXY=2) [a checking account] IA10a=1/SP CHECKING [a savings or money market account] IA10c=1/SP SAVINGS [certificates of deposit or CDs] IA10c=1/SP CDS If more than one type of account displayed, display "and" between each one. Display "last month" in underlined text.
	BOX IAQ10B	If IAQ12 = 1 (SP CDs), go to IAQ39b. Otherwise, go to IAQ39c.		
ACCTS_SP2	IAQ39B	SHOW CARD IA25 Please look at this card and tell me which is closest.	(1) LESS THAN $8,000 (2) $8,000 TO LESS THAN $13,000 (3) $13,000 TO LESS THAN $28,000 (4) $28,000 TO LESS THAN $54,000 (5) $54,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
ACCTS_SP3	IAQ39C	SHOW CARD IA26 Please look at this card and tell me which is closest.	(1) LESS THAN $500 (2) $500 TO LESS THAN $1,900 (3) $1,900 TO LESS THAN $5,000 (4) $5,000 TO LESS THAN $20,000 (5) $20,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ10C	If IAQ10 = 2 (SPOUSE CHECKING) or IAQ11 = 2 (SPOUSE SAVINGS) or IAQ12 = 2 (SPOUSE CDS), go to IAQ40A. Otherwise, go to BOX IAQ11.		
ACCTS_SPOUSE1	IAQ40A	You told me earlier that [you have/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME) has] [a checking account] [a savings or money market account] [certificates of deposit or CDs]. If you added up all of these accounts, about how much were they worth early <u>last month</u> (meaning in the beginning of [CURRENT MONTH – 1])? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SPOUSE/PARTNER ACCOUNTS TOTAL AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you have] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME) has] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME) has] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) [a checking account] IA10a=2/SPOUSE CHECKING [a savings or money market account] IA10b=2/SPOUSE SAVINGS [certificates of deposit or CDs] IA10c=2/SPOUSE CDS If more than one type of account displayed, display "and" between each one. Display "last month" in underlined text.
	BOX IAQ10D	If IAQ12 = 2 (SPOUSE CDS), go to IAQ40b. Otherwise, go to IAQ40c.		
ACCTS_SPOUSE2	IAQ40B	SHOW CARD IA25 Please look at this card and tell me which is closest.	(1) LESS THAN $8,000 (2) $8,000 TO LESS THAN $13,000 (3) $13,000 TO LESS THAN $28,000 (4) $28,000 TO LESS THAN $54,000 (5) $54,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
ACCTS_SPOUSE3	IAQ40C	SHOW CARD IA26 Please look at this card and tell me which is closest.	(1) LESS THAN $500 (2) $500 TO LESS THAN $1,900 (3) $1,900 TO LESS THAN $5,000 (4) $5,000 TO LESS THAN $20,000 (5) $20,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ11	If [IAQ8 = 1 (SP MUTUAL FUNDS) and IAQ8 = 2 (SPOUSE MUTUAL FUNDS)] or IAQ8 = 3 (JOINT MUTUAL FUNDS) or [IAQ9 = 1 (SP BONDS) and IAQ9 = 2 (SPOUSE BONDS)] or IAQ9 = 3 (JOINT BONDS), or [IAQ10 = 1 (SP CHECKING) and IAQ10 = 2 (SPOUSE CHECKING)] or IAQ10 = 3 (JOINT CHECKING) or [IAQ11 = 1 (SP SAVINGS) and IAQ11 = 2 (SPOUSE SAVINGS)] or IAQ11 = 3 (JOINT SAVINGS), or [IAQ12 = 1 (SP CDS) and IAQ12= 2 (SPOUSE CDS)] or IAQ12 = 3 (JOINT CDS), go to IAQ41. Else if IAQ8 = 1 (SP MUTUAL FUNDS) or IAQ9 = 1 (SP BONDS) or IAQ10 = 1 (SP CHECKING) or IAQ11 = 1 (SP SAVINGS) or IAQ12 = 1 (SP CDS), go to IAQ42A. Else if IAQ8 = 2 (SPOUSE MUTUAL FUNDS) or IAQ9 = 2 (SPOUSE BONDS) or IAQ10 = 2 (SPOUSE CHECKING) or IAQ11 = 2 (SPOUSE SAVINGS) or IAQ12 = 2 (SPOUSE CDS), go to IAQ43A. Otherwise, go to BOX IAQ12.		
INTEREST_COMBINED1	IAQ41	Now thinking about all of last year, that is calendar year [CURRENT YEAR − 1], how much interest and dividend income did [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have altogether from [mutual funds or stocks] [government, corporate, or other bonds] [bank accounts or CDs]? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP)] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [(SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) [mutual funds or stocks] IA8=1/SP MUTUAL FUNDs or 2/SPOUSE MUTUAL FUND) or 3/JOINT MUTUAL FUNDS [government, corporate, or other bonds] IA9=1/SP BONDS or 2/SPOUSE BONDS or 3/JOINT BONDS [bank accounts or CDs] (IA10a=1/SP CHECKING or 2/SPOUSE CHECKING or 3/JOINT CHECKING) or (IA10b = 1/SP SAVINGS or 2/SPOUSE SAVINGS or 3/JOINT SAVINGS) or (IA10c=1/SP CDS or 2/SPOUSE CDS or 3/JOINT CDS) If more than one type of asset displayed, display "and" between each one. Display "In the last year" in underlined text.
INTEREST_COMBINED2	IAQ41A	ENTER SP AND SPOUSE'S/PARTNER'S INTEREST AND DIVIDEND INCOME AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
INTEREST_COMBINED3	IAQ41B	SHOW CARD IA27 Please look at this card and tell me which is closest.	(1) LESS THAN $200 (2) $200 TO LESS THAN $1,000 (3) $1,000 TO LESS THAN $4,000 (4) $4,000 TO LESS THAN $16,000 (5) $16,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
INTEREST_SP1	IAQ42A	Now thinking about all of <u>last year</u>, that is calendar year [CURRENT YEAR – 1], how much interest and dividend income did [you/(SP)] have altogether from [mutual funds or stocks] [bonds] [bank accounts or CDs]? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SP INTEREST AND DIVIDEND INCOME AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) [(SP)] respondent is proxy (SPPROXY=2) [mutual funds or stocks] IA8=1/SP MUTUAL FUNDS [bonds] IA9=1/SP BONDS [bank accounts or CDs] IA10a=1/SP CHECKING or IA10b=1/SP SAVINGS or IA10c=1/SP CDS If more than one type of asset displayed, display "and" between each one. Display "last year" in underlined text.
INTEREST_SP2	IAQ42B	SHOW CARD IA28 Please look at this card and tell me which is closest.	(1) LESS THAN $400 (2) $400 TO LESS THAN $1,000 (3) $1,000 TO LESS THAN $2,000 (4) $2,000 TO LESS THAN $11,000 (5) $11,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ11A	If IAQ8 = 2 (SPOUSE MUTUAL FUNDS) or IAQ9 = 2 (SPOUSE BONDS) or IAQ10 = 2 (SPOUSE CHECKING) or IAQ11 = 2 (SPOUSE SAVINGS) or IAQ12 = 2 (SPOUSE CDS), go to IAQ43A. Otherwise, go to BOX IAQ12.		
INTEREST_SPOUSE1	IAQ43A	Now thinking about all of <u>last year</u>, that is calendar year [CURRENT YEAR – 1], how much interest and dividend income did [you/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] have altogether from [mutual funds or stocks] [bonds] [bank accounts or CDs]? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SPOUSE/PARTNER INTEREST AND DIVIDEND INCOME AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) [mutual funds of stocks] IA8=2/SPOUSE MUTUAL FUNDS [bonds] IA9=2/SPOUSE BONDS [bank accounts or CDs] IA10a=2/SPOUSE CHECKING or IA10b=2/SPOUSE SAVINGS or IA10c=2/SPOUSE CDS If more than one type of asset displayed, display "and" between each one. Display "In the last year" in bold underlined text.
INTEREST_SPOUSE2	IAQ43B	SHOW CARD IA28 Please look at this card and tell me which is closest.	(1) LESS THAN $400 (2) $400 TO LESS THAN $1,000 (3) $1,000 TO LESS THAN $2,000 (4) $2,000 TO LESS THAN $11,000 (5) $11,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ12	If [IAQ13 = 1 (SP BUSINESS/FARM/REAL ESTATE) and IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE)] or IAQ13 =3 (JOINT BUSINESS/FARM/REAL ESTATE), go to IAQ44. Else if IAQ13 = 1 (SP BUSINESS/FARM/REAL ESTATE), go to IAQ45A. Else if IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ46A. Otherwise, go to BOX IAQ13.		
LAND_COMBINED1	IAQ44	You told me earlier that [you/(SP)] and [(SP FIRSTNAME LASTNAMe)/(SPOUSE FIRSTNAME LASTNAME)/PARTNER FIRSTNAME LASTNAME] have a business, a farm, or real estate [other than (SP)'s home]. If that were sold today and any debts on it were paid off, about how much would it bring? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP)] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [(SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) [other than (SP)'s home] HP1=1/OWNS HOME

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
LAND_COMBINED2	IAQ44A	ENTER SP AND SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
LAND_COMBINED3	IAQ44B	SHOW CARD IA29 Please look at this card and tell me which is closest.	(1) LESS THAN $30,000 (2) $30,000 TO LESS THAN $101,000 (3) $101,000 TO LESS THAN $247,000 (4) $247,000 TO LESS THAN $703,000 (5) $703,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
LAND_SP1	IAQ45A	You told me earlier that [you have/(SP) has] a business, a farm, or real estate [other than (SP)'s home]. If that were sold today and any debts on it were paid off, about how much would it bring? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SP BUSINESS/FARM/REAL ESTATE AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you have] respondent is SP (SPPROXY=1) [(SP) has] respondent is proxy (SPPROXY=2) [other than (SP)'s home] HP1=1/OWNS HOME
LAND_SP2	IAQ45B	SHOW CARD IA30 Please look at this card and tell me which is closest.	(1) LESS THAN $18,000 (2) $18,000 TO LESS THAN $68,000 (3) $68,000 TO LESS THAN $122,000 (4) $122,000 TO LESS THAN $293,000 (5) $293,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ12A	If IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ46A. Otherwise, go to BOX IAQ13.		
LAND_SPOUSE1		You told me earlier that [you have/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME) has] a business, a farm, or real estate [other than (SP)'s home]. If that were sold today and any debts on it were paid off, about how much would it bring? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you have] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME) has] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME) has] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) [other than (SP)'s home] HP1=1/OWNS HOME
LAND_SPOUSE2	IAQ46B	SHOW CARD IA30 Please look at this card and tell me which is closest.	(1) LESS THAN $18,000 (2) $18,000 TO LESS THAN $68,000 (3) $68,000 TO LESS THAN $122,000 (4) $122,000 TO LESS THAN $293,000 (5) $293,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ13	If [IAQ13 = 1 (SP BUSINESS/FARM/REAL ESTATE) and IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE)] or IAQ13 = 3 (JOINT BUSINESS/FARM/REAL ESTATE), go to IAQ47. Else if IAQ13 = 1 (SP BUSINESS/FARM/REAL ESTATE), go to IAQ48A. Else if IAQ13 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ49A. Otherwise, go to IAQ50.		

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
INCOME_COMBINED1	IAQ47	Now thinking about all of <u>last year</u>, that is calendar year [CURRENT YEAR – 1], how much income did [you/(SP)] and [(SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive from these businesses or property before any federal or state taxes were taken out? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.	(1) ENTER COMBINED AMOUNT (2) ENTER SP AND SPOUSE/PARTNER AMOUNTS SEPARATELY (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP)] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [(SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=256, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) Display "last year" in underlined text.
INCOME_COMBINED2	IAQ47A	ENTER SP AND SPOUSE/PARTNER FROM BUSINESS/FARM/REAL ESTATE COMBINED AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
INCOME_COMBINED3	IAQ47B	SHOW CARD IA31 Please look at this card and tell me which is closest.	(1) LESS THAN $3,600 (2) $3,600 TO LESS THAN $12,000 (3) $12,000 TO LESS THAN $25,000 (4) $25,000 TO LESS THAN $64,000 (5) $64,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
INCOME_SP1	IAQ48A	Now thinking about all of <u>last year</u>, that is calendar year [CURRENT YEAR – 1], how much income did [you/(SP)] receive from these businesses or property before any federal or state taxes were taken out? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SP BUSINESS/FARM/REAL ESTATE AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) [(SP)] respondent is proxy (SPPROXY=2) Display "last year" in underlined text.
INCOME_SP2	IAQ48B	SHOW CARD IA32 Please look at this card and tell me which is closest.	(1) LESS THAN $3,600 (2) $3,600 TO LESS THAN $7,200 (3)$7,200 TO LESS THAN $14,000 (4) $14,000 TO LESS THAN $38,000 (5) $38,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
	BOX IAQ13A	If IAQ3 = 2 (SPOUSE BUSINESS/FARM/REAL ESTATE), go to IAQ49A. Otherwise, go to IAQ50.		
INCOME_SPOUSE1	IAQ49A	Now thinking about all of <u>last year</u>, that is calendar year [CURRENT YEAR – 1], how much income did [you/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive from these businesses or property before any federal or state taxes were taken out? IF NEEDED: We don't need an exact dollar amount. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER SPOUSE/PARTNER BUSINESS/FARM/REAL ESTATE AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [(PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) Display "last year" in underlined text.

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
INCOME_SPOUSE2	IAQ49B	SHOW CARD IA32 Please look at this card and tell me which is closest.	(1) LESS THAN $3,600 (2) $3,600 TO LESS THAN $7,200 (3)$7,200 TO LESS THAN $14,000 (4) $14,000 TO LESS THAN $38,000 (5) $38,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
TOTAL_COMBINED1	IAQ50	Now I want to ask about [your/(SP)'s] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)'s] total income for last year, that is, for the calendar year ending in December [CURRENT YEAR - 1], before any federal or state taxes were taken out. Now think about that total income from: [Social Security or Railroad Retirement] [Supplemental Security Income] [the Veteran's Administration] [a pension plan] [any retirement accounts] [mutual funds or stocks] [bonds] [bank accounts] [CDs] [business, farm or real estate] [jobs] and from any other sources. How much was [your/(SP)'s] [and (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)'s] total income before taxes for last year (this is, for the 12 months ending in December [CURRENT YEAR - 1])? IF NEEDED: We don't need an exact dollar amount – the nearest $1,000 is fine. IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health. ENTER TOTAL INCOME FOR LAST YEAR. DO NOT INCLUDE LUMP SUM PAYMENTS RECEIVED FROM AN INHERITANCE, A TRUST FUND, AN INSURANCE SETTLEMENT, A PENSION SETTLEMENT, OR A GIFT.	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[your] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP)'s] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [and (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), proxy is SP's spouse or partner (ROSTREL=2 or 56) [and (SPOUSE FIRSTNAME LASTNAME)] SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), if respondent is proxy then proxy is not SP's spouse (ROSTREL^=2) [and (PARTNER FIRSTNAME LASTNAME)] SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), if respondent is proxy then proxy is not SP's partner (ROSTREL^=56) [Social Security or Railroad Retirement] IAQ1=1 or 2 [Supplemental Security Income] IAQ4=1 or 2 [the Veteran's Administration] IAQ5=1 or 2 [a pension plan] IAQ6=1 or 2 [any retirement accounts] IAQ7=1 or 2 [mutual funds or stocks] IAQ8=1, 2 or 3 [bonds] IAQ9=1, 2, or 3 [bank accounts] (IAQ10A=1, 2, or 3) or (IAQ10B=1, 2, or 3) [CDs] IAQ10C=1, 2, or 3 [business, farm, or real estate] IAQ13=1, 2, or 3 [jobs] LF1=1 or LF2=1 or LF3=1 or LF13=1 If SPAISTATUS=3 (Deceased in Community) or 4 (Deceased in Institution), display all sources of income. If more than one income source displayed, display "and" between each one. Display "last year" in underlined text."
	BOX IAQ13B	If SPAISTATUS = 3 (Deceased in Community) or 4 (Deceased in Institution), go to BOX ENDIAQ. Otherwise, go to IAQ52-LUMP.		
	BOX IAQ14	If SPMARSTA = 1 (MARRIED) SP has a spouse or partner who is living in the household (ROSTREL=2 or 65, HHFLAG=1), go to IAQ51A. Otherwise, go to IAQ51B.		
TOTAL_COMBINED2	IAQ51A	SHOW CARD IA33 Please look at this card and tell me which is closest.	(1) LESS THAN $30,000 (2) $30,000 TO LESS THAN $43,000 (3) $43,000 TO LESS THAN $66,000 (4) $66,000 TO LESS THAN $109,000 (5) $109,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
TOTAL_SP1	IAQ51B	SHOW CARD IA34 Please look at this card and tell me which is closest.	(1) LESS THAN $18,000 (2) $18,000 TO LESS THAN $22,000 (3) $22,000 TO LESS THAN $36,000 (4) $36,000 TO LESS THAN $56,000 (5) $56,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
	BOX IAQ15	If SPAISTATUS = 3 (Deceased in Community) or 4 (Deceased in Institution), go to BOX ENDIAQ. Otherwise, go to IAQ52-LUMP.		
LUMP	IAQ52	SHOWCARD IA35 People sometimes receive large amounts of money or property in the form of an inheritance, a trust fund, an insurance settlement, and so on. Now thinking about last year, that is, the calendar year ending in December [CURRENT YEAR - 1], [have you/has (SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] received money or property in the form of an inheritance, a trust fund, an insurance settlement, a pension settlement, a gift, or a lawsuit?	(1) YES, SP OR SPOUSE/PARTNER RECEIVED PAYMENT FROM SOURCE (2) NO PAYMENT RECEIVED FROM THIS SOURCE (-8) DON'T KNOW (-9) REFUSED	[have you] respondent is SP (SPPROXY=1), SP does not have a spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [has (SP)] respondent is proxy (SPPROXY=2), SP does not have a spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY), proxy is SP's spouse or partner (ROSTREL=2 or 56, HHFLAG=1) [you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [(SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [(SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's [partner (ROSTREL^=56)
LUMPFORM	IAQ52A	SHOWCARD IA35 What was the largest lump sum [you/(SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] received - was it from an inheritance, a trust, an insurance settlement, a pension settlement, a gift, a lawsuit, or what?	(1) INSURANCE SETTLEMENT (2) PENSION SETTLEMENT (3) INHERITANCE (OR TRUST) (4) GIFT (5) LASWSUIT (91) OTHER (SPECIFY) (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1), SP does not have a spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [(SP)] respondent is proxy (SPPROXY=2), SP does not have a spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY), proxy is SP's spouse or partner (ROSTREL=2 or 56, HHFLAG=1) [you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [(SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [(SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's [partner (ROSTREL^=56)
LUMP_OTH	IAQ52A	OTHER (SPECIFY)	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	
LUMP_SUM1	IAQ52B	About how much did [you/(SP)] [or (SP FIRSTNAME LASTNAME)/(SPOUSE FIRSTNAME LASTNAME)/(PARTNER FIRSTNAME LASTNAME)] receive from the [insurance settlement/pension settlement/inheritance or trust/gift/lawsuit/(OTHER)]? DO NOT PROBE.	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1), SP does not have a spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [(SP)] respondent is proxy (SPPROXY=2), SP does not have a spouse or partner who is alive and living in the household (ROSTREL^=2 or 56, or ROSTREL=2 or 56 and HHFLAG^=1) [you or (SP FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY), proxy is SP's spouse or partner (ROSTREL=2 or 56, HHFLAG=1) [you or (SPOUSE FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1) [you or (PARTNER FIRSTNAME LASTNAME)] respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1) [(SP) or (SPOUSE FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), proxy is not SP's spouse (ROSTREL^=2) [(SP) or (PARTNER FIRSTNAME LASTNAME)] respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's [partner (ROSTREL^=56) [insurance settlement] IAQ13c=1/Insurance Settlement [pension settlement] IAQ13c=2/Pension Settlement [inheritance or trust] IAQ13c=3/Pension Settlement [gift] IAQ13c=4/Pension Settlement [lawsuit] IAQ13c=5/Pension Settlement [(OTHER)] IAQ13c=91/Other
LUMP_SUM2	IAQ52C	Did it amount to less than $50,000, more than $50,000, or what? DO NOT PROBE.	(1) LESS THAN $50K (2) ABOUT $50K (3) MORE THAN $50K (-8) DON'T KNOW (-9) REFUSED	

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
OWNCAR	CO1	Now, I would like to change topics and talk about automobiles [you own/(SP) owns] [or (your/his/her) (husband/wife/partner) owns]. [Do you/Does (SP)] [or (your/his/her) (husband/wife/partner)] own any cars, trucks, or vans? IF NEEDED: Do not include recreational vehicles, such as motorcycles, trailers, motor homes, boats, or airplanes.	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[you own] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP) owns] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [or your husband owns] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTESEX=1)) or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is male (ROSTSEX=1), proxy is SP's spouse (ROSTREL=2)) [or your wife owns] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTESEX=2)) or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is female (ROSTSEX=2), proxy is SP's spouse (ROSTREL=2)) [or your partner owns] (respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1)) or (respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is SP's partner (ROSTREL=56)) [or his husband owns] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2) [or his wife owns] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL^=2) [or his partner owns] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) [or her husband owns] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2) [or her wife owns] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL^=2) [or her partner owns] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) [Do you] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56)
NUMCAR	CO2	How many vehicles [do you/does (SP)] [or (your/his/her) (husband/wife/partner)] own? ENTER NUMBER OF VEHICLES	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[do you] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [does (SP)] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56) [or your husband] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTESEX=1)), or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is male (ROSTSEX=1), proxy is SP's spouse (ROSTREL=2)) [or your wife] (respondent is SP (SPPROXY=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTESEX=2)) or (respondent is proxy (SPPROXY=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP is female (ROSTSEX=2), proxy is SP's spouse (ROSTREL=2)) [or your partner] (respondent is SP (SPPROXY=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1)) or (respondent is proxy (SPPROXY=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is SP's partner (ROSTREL=56)) [or his husband] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2) [or his wife] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL^=2) [or his partner] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56) [or her husband] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is male (ROSTSEX=1), proxy is not SP's spouse (ROSTREL^=2) [or her wife] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a spouse who is alive and living in the household (ROSTREL=2, HHFLAG=1), SP's spouse is female (ROSTSEX=2), proxy is not SP's spouse (ROSTREL^=2) [or her partner] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP has a partner who is alive and living in the household (ROSTREL=56, HHFLAG=1), proxy is not SP's partner (ROSTREL^=56)
	BOX CO2	If CO2 NE 2, go to CO3. Otherwise, go to FSINTRO1.		
PVCAR1	CO3	Altogether, what is their present value, that is, about how much would they bring if [you/(SP)] sold them on today's market? ENTER DOLLAR AMOUNT	(1) [continuous response] (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy is SP's spouse or partner (ROSTREL=2 or 56) [(SP)] respondent is proxy (SPPROXY=2), proxy is not SP's spouse or partner (ROSTREL^=2 or 56)

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
PVCAR2	CO3A	SHOW CARD ~~IA35~~ IA36 Please look at this card and tell me which is closest.	(1) LESS THAN $2,500 (2) $2,500 TO LESS THAN $5,000 (3) $5,000 TO LESS THAN $7,500 (4) $7,500 TO LESS THAN $10,000 (5) $10,000 TO LESS THAN $20,000 (6) $20,000 OR MORE (-8) DON'T KNOW (-9) REFUSED	
FSINTRO1	FSINTRO1	These next questions are about the food eaten in [your/(SP)'s] household in the last 12 months, since [current month] of last year and whether [you were/he was/she was/they were] able to afford the food [you need/he needs/she needs/they need].		[your] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) [(SP)'s] respondent is proxy (SPPROXY=2), proxy does not live with SP (HHFLAG^=1) [you were] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) [he was] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP lives alone (only SP has HHFLAG=1) [she was] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP lives alone (only SP has HHFLAG=1) [they were] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAG is greater than one), proxy does not live with SP (HHFLAG^=1) [you need] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) [he needs] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP lives alone (only SP has HHFLAG=1) [she needs] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP lives alone (only SP has HHFLAG=1) [they need] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAG=1 is greater than one), proxy does not live with SP (HHFLAG^=1)
FOODLAST	FS1	I'm going to read you some statements that people have made about their food situation. For these statements, please tell me whether the statement was often true, sometimes true, or never true for [you/your household/(SP)/(SP)'s household] in the last 12 months—that is, since last [current month]. The first statement is, The food that [I/we/(SP)/(SP) or other adults in (SP)'s household] bought just didn't last, and [I/we/he/she/they] didn't have money to get more. Was that often, sometimes, or never true for [you/your household/(SP)/(SP)'s household] in the last 12 months?	(1) OFTEN TRUE (2) SOMETIMES TRUE (3) NEVER TRUE (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) [your household] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) [(SP)] respondent is proxy (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) [(SP)'s household] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAH=1 is greater than one), proxy does not live with SP (HHFLAG^=1) [I] respondent is SP (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) [We] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) [(SP)] respondent is proxy (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) [(SP) or other adults in (SP)'s household] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAH=1 is greater than one), proxy does not live with SP (HHFLAG^=1) [I] respondent is SP (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) [We] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) [he] IF SPPROXY = 2(proxy) and SP lives alone and SP is male [he] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP lives alone (only SP has HHFLAG=1) [she] IF respondent is proxy (SPPROXY=1), SP is female (ROSTSEX=2), SP lives alone (only SP has HHFLAG=1) [they] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAH=1 is greater than one), proxy does not live with SP (HHFLAG^=1) [you] respondent is SP (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) [your household] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) [(SP)] respondent is proxy (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) [(SP)'s household] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAH=1 is greater than one), proxy does not live with SP (HHFLAG^=1)
FOODLAST_OFTEN	FS2	The next statement is: [I/we/(SP)/(SP) or other adults in (SP)'s household] couldn't afford to eat balanced meals. Was that often, sometimes, or never true for [you/your household/(SP)/(SP)'s household] in the last 12 months? [IF NEEDED: For these statements, please tell me whether the statement was often true, sometimes true, or never true for [you/your household/(SP)/(SP)'s household] in the last 12 months—that is, since last [current month].]	(1) OFTEN TRUE (2) SOMETIMES TRUE (3) NEVER TRUE (-8) DON'T KNOW (-9) REFUSED	[I] respondent is SP (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) [We] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) [(SP)] respondent is proxy (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) [(SP) or other adults in (SP)'s household] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAH=1 is greater than one), proxy does not live with SP (HHFLAG^=1) [you] respondent is SP (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) [your household] respondent is SP (SPPROXY=1) or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) [(SP)] respondent is proxy (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) [(SP)'s household] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAG=1 is greater than one), proxy does not live with SP (HHFLAG^=1)

Variable Name	MR Screen Name	Question text/description	Code list	Text Fill Logic
SKIPMEAL	FS3	In the last 12 months, since last (name of current month), did [you/you or other adults in your household/(SP)/((SP) or other adults in (SP)'s household] ever cut the size of [your/his/her/their] meals or skip meals because there wasn't enough money for food?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1), SP lives alone (only SP has HHFLAG=1) [you or other adults in your household] respondent is SP (SPPROXY=1) and one or more persons live with SP (count of persons with HHFLAG=1 is greater than one), or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) [(SP)] respondent is proxy (SPPROXY=2), SP lives alone (only SP has HHFLAG=1) [(SP) or other adults in (SP)'s household] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAG=1 is greater than one), proxy does not live with SP (HHFLAG^=1) [your] respondent is SP (SPPROXY=1) and one or more persons live with SP (count of persons with HHFLAG=1 is greater than one), or respondent is proxy (SPPROXY=2) and proxy lives with SP (HHFLAG=1) [his] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1), SP lives alone (only SP has HHFLAG=1) [her] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2), SP lives alone (only SP has HHFLAG=1) [their] respondent is proxy (SPPROXY=2), one or more persons live with SP (count of persons with HHFLAG=1 is greater than one), proxy does not live with SP (HHFLAG^=1)
SKIPMEAL_OFTEN	FS3A	How often did this happen—almost every month, some months but not every month, or in only 1 or 2 months?	(1) ALMOST EVERY MONTH (2) SOME MONTHS BUT NOT EVERY MONTH (3) IN ONLY 1 OR 2 MONTHS (-8) DON'T KNOW (-9) REFUSED	
EATLESS	FS4	In the last 12 months, did [you/(SP)] ever eat less than [you/he/she] felt [you/he/she] should because there wasn't enough money for food?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[you] respondent is SP (SPPROXY=1) [(SP)] respondent is proxy (SPPROXY=2) [you] respondent is SP (SPPROXY=1) [he] respondent is proxy (SPPROXY=2), SP is male (ROSTSEX=1) [she] respondent is proxy (SPPROXY=2), SP is female (ROSTSEX=2)
HUNGRY	FS5	In the last 12 months, [were you/was (SP)] ever hungry but didn't eat because there wasn't enough money for food?	(1) YES (2) NO (-8) DON'T KNOW (-9) REFUSED	[were you] respondent is SP (SPPROXY=1) [was (SP)] respondent is proxy (SPPROXY=2)